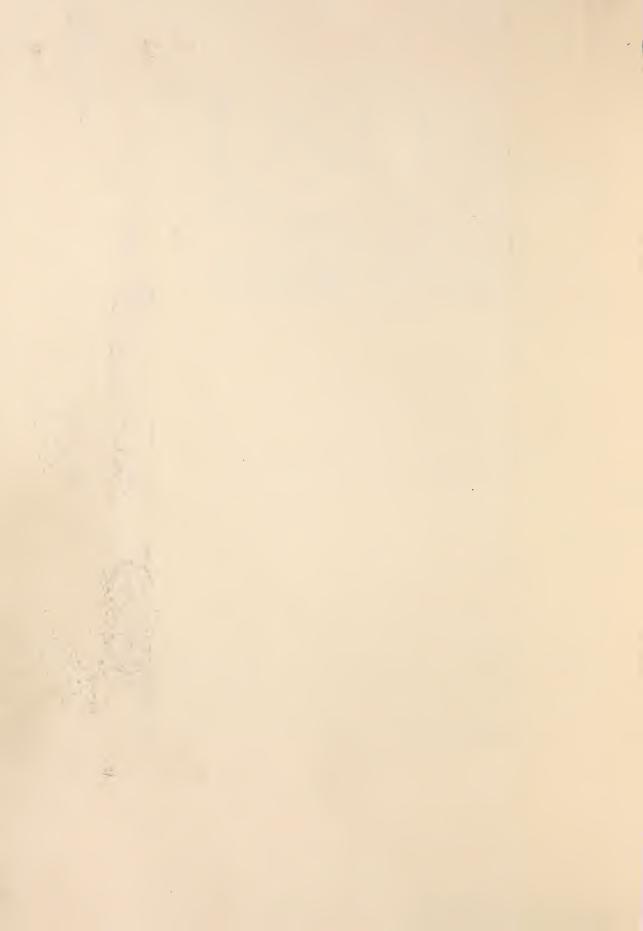
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foreign agriculture circular

dried fruits

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DRIED FRUIT SITUATION HIGHLIGHTS

The 1981/82 world dried fruit situation is characterized by heavy supplies of raisins and prunes and a scarcity of dried apricots. Supplies of dried figs and currants are considered to be adequate or better.

The 1981 $\underline{\text{raisin}}$ output in the major producing countries is estimated near 632,000 tons $\underline{1}/.$ While this is down nearly 11 percent from last year's unusually large production, the United States and Greece entered the 1981/82 marketing season with heavy stocks. Although raisin output in Greece and Turkey are the largest in several years, they were more than offset by sharp reductions in the United States and Australia.

So far this season, Turkey has dominated new crop raisin sales in Europe. Greece has been disposing of old crop stocks while negotiating with the European Community (EC) for more financial assistance for this year's large crop. Because of this and the continued strength of the dollar, there is very little interest in U.S. raisins at current prices.

A large <u>prune</u> crop abroad will limit U.S. exports in 1981/82. Prune production is moderately lower in the United States, while France may have a record output. Prune production in Yugoslavia also may have been the largest since 1977.

With the turmoil in Iran and an untimely frost in Turkey, the world supply of <u>dried apricots</u> could be at its lowest level in more than two decades. Exportable supplies will be extremely low and rationed by price.

^{1/} Quantity units are metric unless otherwise specified. One metric ton equals 1,000 kilograms or 2,204.6 pounds.

RAISINS

<u>United States</u>. The 1981 dried raisin output is estimated at 226,800 tons, 20 percent under last year's record. Weather was excellent during harvest; consequently, a high sugar content and a very light crop have contributed to a good quality raisin crop with low dry-away ratios, which are expected to average about 4:1. According to current trade estimates, output of natural seedless raisins will be somewhat above 195,045 tons, compared with 231,021 tons a year ago. However, with larger carryover, the total supply of natural seedless raisins during the 1981/82 season could be slightly more than last year.

The Raisin Bargaining Association has reached an agreement with California packers for a 1981 field price of \$1,405 per ton. The base price for both natural seedless and Zante raisin varieties was \$83 a ton higher than in 1980.

The Raisin Administrative Committee has recommended a preliminary free and reserve tonnage of 71 percent and 29 percent, respectively, for both natural seedless and dipped seedless raisins.

Exports of raisins during the 1980/81 marketing year totaled 64,876 tons, 4.5 percent below the previous year's level. Exports to the EC dropped 35 percent from the high 1979/80 level because of stiff price competition from Australia, Greece, and Turkey. However exports to Japan rose 24 percent. The export outlook for this marketing year is not promising. A strong U.S. dollar and large crops in both Greece and Turkey will limit U.S. exports. Moreover, ongoing negotiations between Greece and the EC Commission over EC support measures for Greek raisins have temporarily destabilized the European market. As of this date, Greece has not established export prices for this year's large crop.

Turkey. Total grape area is reportedly stable at about 850,000 hectares, producing roughly 3.8 million tons of grapes. Utilization is estimated as follows: 25 percent consumed fresh, 37 percent used for "pekmez" (syrup), 3 percent for wine, and 35 percent dried. However, about 13 percent of the dried output is then used to make "raki" (alcoholic beverage). Sultana (seedless) raisin area (located almost entirely within the Aegean region) is around 68,000 hectares and capable of producing around 120,000 tons. However, raisin output in 1981/82 is expected to equal last season's 95,000 tons. In addition, Turkey produces about 10,000 tons of raisins with seeds.

The minimum grower support price for No 9 raisins has been increased from last year's TL 85 to TL 110/kilogram. However, since the exchange rate has dropped from roughly TL 80 to TL 118 per/U.S. dollar during that period, in terms of US dollars the support price has actually dropped from \$1.06 to 93 U.S. cents per kilogram. Additional premiums are available for raisins dried in concrete drying yards (1.3 lira/kg), raisins dried on paper or canvas (1 lira/kg.), and raisins produced from trelissed vineyards (1.3 lira/kq.).

The 1981/82 export market opened at prices around \$1,400 per ton f.o.b. However, competition among local exporters led foreign buyers to pull prices downward. In fact, some exporters who had sold raisins for future deliveries at prices around the \$1,400 level were forced to cut prices for new orders to prevent cancellation of earlier contracts. As of mid-November, export prices for No. 9 raisins had dropped to around \$1,100 per ton f.o.b., according to a recent report. Since the beginning of the season, about 9,900 tons of seedless raisins have been shipped for export, compared with 6,500 tons dur- ing the same period of 1980/81. Due to the sharp decline in prices, export value rose only 20 percent, while export volume is up 52 percent.

Two policy changes affecting purchasing and exports this year are: (1) the amount of credit granted to TARIS (the supporting agent) has been reduced from TL 5 billion to TL 3.3 billion; and (2) instead of establishing different export deposit rates for different grades, a single rate of 20 lira per kilogram has been established for all grades of raisins. With the amount of credit granted, TARIS could purchase only one-third of the 1981 crop. Therefore, TARIS is purchasing selectively and is delaying payments. This, however, is creating dissatisfaction among farmers and subsequently encouraging deliveries to the free market. Private buyers are taking advantage of the increased deliveries and are purchasing raisins at prices below the support levels.

Competitiveness of Turkish raisins in 1981/82 are expected to increase sales to the EC and also help Turkish packers reenter the Canadian market. Turkish packers assert that Greece's efforts to dominate the EC market will not prevent entry of Turkish raisins in that market. As part of the bilateral agreements with the near Eastern and East European countries, raisin exports to those destinations are expected to at least maintain, or even to increase, the 1980/81 levels.

The bulk of raisins exported are in 14 kilogram boxes or cartons. However, shipments in small retail cellophane packs (.250 kg and .5 kg) have increased in recent years. Although the proportion of the sulphur bleached raisins is not known, trade sources report that exports of natural (unbleached) raisins are increasing at the expense of bleached raisins. Similarly, at customers' request, raisins are not coated with paraffin oil or sultanol (a vegetable oil).

Sultana raisin exports during calendar 1980 amounted to 73,908 tons (\$125.3 million), compared with 69,818 tons (\$110.4 million) in 1979 and 91,349 tons (\$98.5 million) in 1978. The EC, or Common Market,—the United Kingdom, Italy, the Netherlands and West Germany, in particular—continues to be Turkey's major market, absorbing 77 percent of its raisin exports. While exports in calendar 1981 may rise to 85,000 tons, the decline in export prices for the new crop will likely result in slightly lower earnings than in 1980. Exports of seedless raisins for calendar years 1978—80 were as follows:

Country of Destination :	1978	:	1979	:	1980
EC Countries Belgium Denmark France Germany, West Ireland Italy Netherlands United Kingdom	3,559 176 4,419 14,106 5,354 11,951 15,243 18,185		2,141 291 4,259 10,247 3,014 9,277 9,551 15,847		1,607 105 4,836 11,063 1,929 12,711 11,518 13,863
Total EC	72,993		54,627		57,632
USSR and Eastern Europe: Other Countries	6,520 11,836		8,303 6,888		11,604 4,672
Grand Total:	91,349		69,818		73,908

SOURCE: Agricultural Attache Reports

Until a few years ago, exports of raisins with seeds were no more than several hundred tons. Since 1977, however, exports have picked up. In 1980, 6,434 tons valued at \$5 million were exported. The biggest customer was the Soviet Union, taking two-thirds of total exports.

Greece. Sultana production in 1981 is currently estimated at 92,000 tons. If it materializes, this would be the largest output since 1974. Improving cultivation techniques and very favorable weather on the island of Crete, where more than 90 percent of the sultanas are grown, are the major contributing factors. According to the Ministry of Agriculture, sultana area, which was estimated at 31,900 hectares in 1980, has declined slowly but steadily during the past few years.

While the minimum grower price was 68 drachmas per kilogram for the 1980 crop, the average weighted grower price was 66.27 drachmas (\$1.53 per kilogram). Although the weighted average price represented an increase of 16 percent from the 1979 level, there was no increase in terms of U.S. dollars due to the declining value of the drachma.

One of the conditions for Greece becoming an EC member (January 1, 1981) was the establishment of EC grower support prices and processor subsidies for Greek raisins, currants, and dried figs. EC regulation No. 2194/81 provides

the framework for these measures for the 1981/82 and 1982/83 marketing seasons. In addition to the EC minimum grower price, the Greek government is authorized during this period to pay growers an additional subsidy not to exceed 8 percent of the 1980/81 minimum grower price, and an extra amount for "mitigation of additional expenses." For the 1981/82 season, growers will receive support payments for No. 4 grade sultanas (drachmas/kilogram) as follows:

EC minimum grower price	72.00
Additional Government support	5.44
Mitigation of additional expenses	2.50
Total grower support	79.94 or US\$1.33 (US\$1 equals 60 drachmas)

According to the EC regulation, processors (packers) will receive an EC subsidy of 7.12 drachmas per kilogram (approximately 12.5 U.S. cents) for sultanas based on signed contracts with growers or approved stocking organizations showing that they have paid at least the minimum price of 72 drachmas. In turn, stocking organizations are eligible for EC storage subsidies equivalent to 3.2 European Currency Units (ECU) per ton each week (roughly US\$ 3.50).

Exports of sultanas by principal areas of destination are as follows:

GREECE: EXPORTS OF SULTANAS (Metric Tons)

Country	1977	1978	1979	1980	
England	8,323	4,641	6,522	3,510	
W. Germany	5,762	7,849	6,969	5,045	
France	3,444	4,801	2,908	2,958	
Italy		3,633	1,712		
Eastern Bloc	38,908	46,209	35,937	40,439	
Other	9,454	6,012	4,349	3,900	
Total	65,891	73,145	58,397	55,852	

SOURCE: National Statistical Service of Greece.

In 1980, the Eastern Bloc countries took 72 percent of total sultana exports and the EC accounted for most of the remainder. However, diversion of exports to other EC countries may now occur in view of Greece's EC membership, high support prices, and the termination of clearing house arrangements with Eastern Bloc countries.

So far this season, Greece has been exporting only old crop sultanas, alledgedly because the EC processing subsidy is not sufficient to make new crop offers competitive. Prior to EC entry, Greece increased grower support prices dramatically—rising two and a half times between 1977 and 1980—without the use of processing subsidies. For this year's crop, the EC increased the Greek support price by 4 drachmas (about 6 percent) and provided

a processing subsidy of 7.12 drachmas. However, with the additional aids provided by the Greek government, the grower support price is about 17.6 percent or 12 drachmas above the 1980 level. Apparently, with the assistance of the EC storage aids, Greece can afford to wait, hoping for either higher world prices or more EC assistance. According to a recent report, the EC will permit storage agencies to offer 25,000 tons of raisins for sale to packers on bids and the EC will compensate Greece for any difference between the bids and the minimum grower price, if the differences are not excessive. This sale reportedly took place on December 8 with sales restricted to EC markets.

Australia. Sultanas are grown on approximately 19,000 hectares which produced 375,068 tons of fresh grapes in 1980. Of this total, 308,707 tons were used for drying and 66,361 tons for winemaking. Raisin production in 1981 was 55,723 tons, of which 51,618 tons were sultanas and 4,105 tons were lexia raisins. This was 39 percent below the 1980 pack. Widespread and heavy rains over the Sunraysia district just prior to harvest (late January and early February) caused heavy losses in the sultana crop, mainly due to splitting of grapes and mold development. As a result, the quality of the pack was well below average and consisted mainly of two-crown and three-crown grades.

The Dried Vine Fruits Stabilization program was terminated in March, following representations by grower organizations. The guaranteed prices under the program were no longer relevant, as they were well below actual returns. The repeal of the legislation avoided the large pay-ins growers would have had to make for the 1979 and 1980 seasons, the last two years of the current program, and which would have been refunded in late 1981. Following failure to agree on a new program in 1980, there was no stabilization program for 1981, and growers relied only on market returns. However, further negotiations between the industry and the government this year resulted in agreement for a new program to cover the 1982-86 period.

The new program proposed by the government would be similar to those now applying to wheat, dairy products, and apples and pears. There would be a guaranteed return from the production of dried sultanas equal to 90 or 95 percent of the average returns in the preceding two seasons and the estimated average for the current season. The figure of 90 percent would apply to the 1982, 1983, and 1984 seasons, while the 95 percent figure would apply to the 1985 and 1986 seasons. If the average return earned in a season is less than the guaranteed level, the difference would be made up by the government from Consolidated Revenue. The guarantee would apply to total production of sultanas, in contrast with the previous program which provided a guarantee for exports only.

Export prices for the two predominate grades of sultanas exported in 1981 were set at A \$1,475 per ton, c.i.f. Europe, for two-crown and A \$1,500 for three-crown (about US \$1,695 and US \$1,725, respectively). Although the Australian sultana crop was well down in 1980, a carry-over of about 6,740 tons from the 1980 season, as of February 28, 1981, brought total available supplies to a respectable 58,358 tons. About 21,000 tons was allocated to the domestic market, leaving about 37,000 tons available for export. The Australian Dried Fruits Corporation allocated about 35,000 tons to various

export markets and held about 2,000 tons in reserve. Export allocations were as follows: Continental Europe, 8,640 tons; United Kingdom/Ireland, 5,640 tons; Canada, 10,000 tons; New Zealand, 4,500 tons; Japan, 2,000 tons; and other small markets 2,000 tons. The latter includes an order from Iraq for 1,000 tons packed in ten, one kilogram cello packs. Orders received to date are already well in excess of 27,000 tons, with sales to New Zealand actually exceeding the allocation. Consequently, the Corporation has only about 7,700 tons uncommitted at present and expects to sell most of this in the next few months.

The minimum export price for lexia raisins to Europe for seeded grades was set at A \$1,500/ton c.i.f. The lexia raisin pack of 4,105 tons, together with the carry-over of about 2,470 tons from the 1980 season brought total availability to about 6,575 tons. About 4,000 tons was allocated to the domestic market, leaving 2,500 tons available for export. The exportable surplus was allocated by the Corporation as follows: Continental Europe, 100 tons; United Kingdom, 1,000 tons; Canada, 200 tons; New Zealand, 600 tons; Japan, 500 tons; and other small traditional markets 100 tons. Sales to date amount to about 1,600 tons, and it remains to be seen if the Corporation will be able to dispose of the entire surplus by the end of the year. It seems somewhat doubtful that Japan will take its full allocation.

Raisins: Exports from Australia (Metric Tons)

Country of Destination	1978	: 1979	: 1980 :
Europe France Germany, West United Kingdom Other.	9,203	4,599 6,334	2,312 13,287 12,282 3,820
Total	23,257	10,933	31,701
Other Countries Canada Japan New Zealand Other.	3,791 4,637 2,869	13,020 3,200 5,901 5,949	16,068 2,378 4,875 2,130
Total	22,259	28,070	25,451
Grand Total	45,516	39,003	57,152

Although the industry will inevitably be faced with marketing problems from time to time, the major problems are the steady rise in production costs in Australia, strengthening of the Australian currency, versus those of its major traditional markets, and the entry of Greece into the EC. The Australian dollar has appreciated 30 to 35 percent against most of the European currencies in the past year, and prices have been difficult to hold at current levels. Not only has this made Australian fruit less attractive to European buyers than Greek and Turkish fruit, but it also has led to some decline in consumption in these markets. This trend will tend to favor Greek and Turkish fruits for some time to come. A consequence of the Greek EC accession may, of course, be the diversion of Greek fruit from its traditional, low-priced markets in Eastern Europe to Western Europe, which would further displace Australian fruit.

<u>South Africa</u>. Raisin output, which accounts for over 70 percent of total dried fruit production, decreased by 6 percent in 1981, but still exceeded average 1976-80 production by more than 75 percent. This new, higher level of production is mainly due to favorable prices and expansion in the Orange River area where over 98 percent of the raisins and 73 percent of all dried fruits are produced.

Production, exports, and average export prices by raisin type are as follows:

	Product	ion	:	Exports	•	Avera Export	ge Prices
<u>1979</u>	1980 (Metric	1981 Tons)	: <u>1979</u> : (Me	1980 tric Ton	1981 s)	1979 Rand p	1980 er MT,
			:		:	С	.i.f.
Thompson Seedless 13,013 Unbleached Sultanas 2,205 Bleached Sultanas 980 Seeded Raisins 1,332	4,595 1,484		: 437	12,783 2,558 590 48	13,506 : 3,297 : 677 : 0 :	1,424	

one rand equal US \$1.19 in 1979 and \$1.29 in 1980

Export prices are set at levels the market will bear. Although, sultana export prices softened during 1980 and apparently during 1981, returns are still considered to be good. The price of fresh sultanas for drying is estimated at 178 rand per ton in 1981, up slightly from the 1980 level.

The Dried Fruit Scheme, a so-called single channel pool scheme, applies throughout the country and no producer may sell controlled dried fruit, i.e. raisins, sultanas, currants, and prunes, except through the Board. The dried fruit is received and graded by the Board's agent, the South African Dried Fruit Cooperative, Ltd. Only the Dried Fruit Board is allowed to export these products.

The Board fixes the advance prices to producers. Fruit for the local market is taken over by the Board's packer for his own account and the packer exports on behalf of the Board. Realizations are pooled and paid to producers after costs are deducted. By the powers vested in the Board under the dried fruit scheme, levies are collected on fruit delivered and used to create stabilization funds, as well as to promote the production of good quality fruit and to stimulate consumption.

Exports of dried fruits are expected to increase to about 20,000 tons during 1981, with nearly 17,500 tons of sultana-type raisins comprising 87 percent of the total. Exports of raisins by principal destinations for calendar years 1978-80 are as follows:

South Africa: Exports of Raisins (Metric Tons)

Country of Destination	1978	:	1979	:	1980
Europe Germany, West United Kingdom Other	731 4,715 206		1,805 6,099 864		2,408 9,120 1,152
Total	5 , 652		8,768		12,680
JapanOther countries	1,210 705		2,386 550		2,218 1,082
Grand Total	7,567		11,704		15,980

Mexico. While the grape industry is growing rapidly in several regions of the country, raisin processing is largely limited to the Caborca and Hermosillo regions of the State of Sonora. A small amount of raisin grapes are produced in Baja California Sur. Areas planted in Baja California Norte are expected to come into production next year. Grape area is estimated at 26,000 hectares in Sonora, with about 60 percent located in the Caborca area. About 30 percent of this area is devoted to raisin production.

Raisin production is estimated to reach 13,000 tons this year. About 50 percent of the Caborca grape crop is used for raisins which, in turn, accounts for roughly 95 percent of Mexico's raisin output. The variety used for raisin production is almost exclusively Thompson seedless.

There are no specific government policies affecting production or exports of dried fruits. Prices for dried fruits are determined by supply and demand. Although price information is not reported, recent export prices supposedly have been slightly below domestic prices. However, with supplies exceeding domestic demand, exports are projected to rise to approximately 6,000 tons in calendar 1981. Brazil accounts for nearly half of total exports.

MEXICO: EXPORTS OF RAISINS (Metric Tons)

Country of Destination :	1979	1980
U.S Colombia. Belgium. Brazil. Ireland. Peru. Other.	476 540 68 1,292 93 94 71	261 338 15 1,707 973 419 40
Total	2,634	3,753

CURRANTS

Greece Area planted to currants continues to decline, with the bulk of the plantings in the bearing stage. Total area in 1980 was an estimated 31,500 hectares. Production this year is expected to be near the 1980 level of 61,800 tons.

Beginning with the 1981 crop, production and processing of currants are supported by EC regulations, implemented as a result of Greece becoming a full member of the European Community. As in the case of raisins, the EC has established a minimum grower price, as well as processing and storage subsidies, while permitting Greece to support grower prices at an even higher level. The support levels for "Trechoumena" currants are summarized as follows (drachmas per kilogram):

EC minimum grower price Additional GOG income support GOG "mitigation of additional expenses" Total grower support	65.65 5.55 2.30 73.50 or US\$1.23 (US\$1 equals 60 drachmas)
EC processing subsidy	6.49
EC storage subsidy	0.197 per week

Exports of currants during 1980 totaled 44,163 tons, a 14 percent decline from the previous year as a result of lower crops in 1979 and 1980. The United Kingdom is the predominate market, accounting for over two-thirds of total currant exports. The Netherlands and the Eastern Bloc are the other principal markets. Exports by destination are shown in the following table.

GREECE: EXPORTS OF CURRANTS

(Metric Tons)

Country	1978	1979	1980
England	5,675 1,351 1,886 3,235	37,416 5,513 1,140 1,239 2,770 3,394	30,005 6,373 1,166 736 3,853 2,030
Total	51,866	51,472	44,163

SOURCE: National Statistical Service.

As of the end of November, Greece had not set export prices for this year's crop, claiming the EC subsidy was not sufficient to cover costs. sequently, the EC supposedly has issued a regulation permitting storage agencies to offer 15,000 tons of currants for sale to processors on bids and the EC will compensate Greece for any difference between the bids and the minimum grower price, if the differences are not excessive. This sale reportedly took place on December 8 with sales restricted to EC markets.

PRUNES

United States. The 1981 prune crop (dried basis) is estimated at 140,600 tons (155,000 short tons), about 5 percent less than the 1980 level. While sun burn in mid-July reportedly caused some fruit drop, this resulted in good sizing for the remaining prunes. Quality and sugar content are expected to be excellent.

With a larger carryover, the total supply of dried prunes for the 1981/82 season is likely to be 196,950 tons (processed condition), up 3 per- cent from last year, according to the Prune Administrative Committee.

Exports during the 1980/81 season totaled 56,417 tons, up almost a third from the previous season due to larger U.S. supplies. Exports to all major destinations increased. Shipments to Western Europe represented 73 percent of total exports, with the EC accounting for 53 percent of the total. However, exports during the current marketing year will decline as result of the strong U.S. dollar and large crops in both France and Yugoslavia.

Due to large U.S. supplies and the unfavorable export outlook, field price negotiations were not concluded as of late November. Compared with a year earlier, preliminary prices for standard French prunes were shaping up at 4 cents per pound lower for large sizes, 3.5 to 4 cents lower for medium, and 3 to 4 cents lower for small sizes. Standard non-French prunes appear to be unchanged, except 3 cents lower for 34/40 sizes.

France. Total area planted to prune type trees is almost 9,300 hectares, of which 7,500 hectares are bearing. The Department of Lot et Garonne accounts for 70 percent of the hectarage. The average size of the orchards is 2.7 hectares per farm. To compensate for a low level of new plantings since 1955, an interprofessional trade organization for prunes (BIP) started an incentive planting program during the 1979/80 crop year. The objective of this program is to offset the removal of old trees and increase planted area to 10,000 hectares by 1984. As a result, plantings totaled 1,000 hectares in 1979-80 and, based on intentions, plantings will be about 700 hectares in 1981, 500 in 1982, and 200 hectares in 1983.

Prune production in 1981 is currently estimated at 27,000 tons, up more than 50 percent from last year's weather-reduced crop. Fruit losses this year were almost nil, while the drying rate improved to 2.9:1. The quality is reportedly very good with fruit size (62 prunes per 500 grams) above average. Production during the next 5 to 10 years should remain stable on the average, with weather causing the usual sharp fluctuations in annual output.

The EC processing subsidy and minimum grower price were increased 42 percent and 10 percent, respectively, from 1980/81 levels. The processing subsidy for dried prunes is 68.10 ECU per 100 kilograms, net, versus 49.90 last year. The minimum producer price is 154.12 ECU per 100 kilograms, ex-grower, for the caliber 66 per 500 grams and a moisture content of 21 to 23 percent. Last season's level was 140.11 ECU's. The current exchange rate is about \$1.09 per ECU.

The increase in prune production this year will reduce 1981/82 imports sharply and increase carryover stocks. Imports jumped to 8,724 tons in 1980/81 with the United States supplying 7,564 tons. Imports this season are forecast at only 3,000 tons and will consist largely of small calibers. Also, the U.S. share is expected to drop as a result of the unfavorable dollar/franc exchange rate and the larger Yugoslav crop.

Exports in 1980/81 totaled 4,174 tons of which about 2,000 tons were re-exports. Algeria was the only major non-EC market, accounting for 36 percent of total exports, and consisted largely of re-exports of U.S. prunes during the May-June Ramadan period.

In spite of larger supplies, domestic consumption will show little change. An estimated eight percent of the French population accounts for 50 percent of domestic consumption. Thus, while carry-over stocks should rise, this would not be considered unfavorable by the trade. The increase would be in larger-size prunes which are normally in short supply.

<u>Yugoslavia</u>. The number of plum trees is expected to surpass 85 million this year with approximately 75 million of bearing age. Over 97 percent of the total number are in the private sector, principally in very small orchards. The 1981 fresh plum crop is unofficially estimated at 620,000 tons, which would be down 7 percent from last year due to some frost and snow in early April and hot, dry weather during July-August. Between 60 and 65 percent of the crop is utilized for the production of brandy, while the amount utilized for dried prunes depends largely upon the export outlook.

Dried prune production is unofficially estimated at 20,000 tons (unpitted) of which about 85 percent will be exported and less than 10 percent will be consumed domestically. Thus, ending stocks are expected to rise somewhat over the low level of 258 tons available on September 30, 1981. Domestic consumption is apparently declining because of limited availability and high prices.

There are no subsidies on the production or exports of dried prunes or fresh plums. When these commodities were excluded from the government price support system in 1978, production was not affected since the system of agreed prices set by processors and the local trade continued to operate satisfactorily. The agreed prices are an advanced payment to growers on the basis of 100 prunes per half kilogram. Final payment occurs after the crop is exported and depends upon the average of actual export prices. This year's agreed prices, compared with 1980 prices, are as follows:

	1981	1980
	(dinars per	: kilogram)
Plums for fresh consumption	8.00	6.00
Fresh plums for drying	8.00	4.50
Prunes dried on the farm	35.00	25.00
Prunes dried in industrial dryers	40.00	30.00

US \$1 equals 37.22 dinars.

The higher prices are based not only on higher input costs, but also reflect the trade's effort to stimulate producer interest in dried prune production.

Exports of dried prunes during this marketing year (October-September) are forecast at 17,500 tons, compared with 17,066 tons last season and only 7,375 tons during 1979/80. The surge in exports is due to increased dried prune outputs, a 30-percent devaluation of the dinar in June 1980, and the trade agreement with the USSR for the 1981-85 period, which includes annual sales of 12,000-15,000 tons of dried prunes. Exports by country of destination are not available, but it is expected that 85 to 90 percent of total exports will continue to go to the USSR. Small amounts are usually sold to Austria, France, Italy, West Germany, East Germany, and Czechoslovakia.

FIGS

Turkey. Commercial production of dried figs is confined to the Aegean region where approximately 22,230 hectares are devoted to this enterprise. Since 1978, favorable market conditions have encouraged farmers to plant new groves and replace old trees with new seedlings. Out of a total of roughly 3.3 million fig trees in the Aegean region, about 300,000 trees are less than 5 years old.

The 1981/82 dried fig production is estimated by the Commodity Exchange at around 60,000 tons, 9 percent above the previous season. Weather conditions were very favorable. With financial support from the Exporters' Association and guidance from the Agricultural Faculty, producers have improved insect control (by bottle traps) and established cleaner drying benches. Both exporters and producers are happy with this year's yield and quality.

The producer support price for the 1981 crop was increased from last year's TL 50 to TL 65 (55 U.S. cents) per kilogram for 53/56 figs per kilogram. Exporters had requested re-establishment of minimum export prices and registration for dried fig exports, but the government again refused. Export prices are reportedly averaging around \$1,000/ton f.o.b., compared with \$1,200 during 1980/81. Prices for fig paste exports to the United States and Canada are around 60 cents per pound c.i.f. Last year fig paste prices were originally around 55 cents but then dropped to 50 cents per pound. Export prices quoted to the United States and Canada continue to be about 40 percent above the prices quoted to other countries due to the higher rejection risk.

In addition to the producer support price, the government has authorized TARIS (Union of Farm Sales Cooperatives) to pay premiums of TL 2 per kilogram for figs having less than 5 percent worm infestation and TL 2 per kilogram for figs that were properly dried and delivered before September 15, 1981. However, with limited funds, TARIS can buy only about 20,000 tons of figs, leaving private packers to purchase two-thirds of the crop. This will enable exporters to purchase figs at prices below support levels.

Total fig, fig paste, and industrial fig exports amounted to 39,176 tons in 1980, compared with 41,309 in 1979 and 39,251 tons in 1978. The EC purchases over half of Turkey's dried fig exports with France, West Germany, and Italy being the major markets. The USSR also is a principal market for natural and processed figs. For fig paste, however, the United Kingdom and the United States are the leading markets.

Exporters are required to deposit TL 15 lira per U.S. dollar of exports into the Price Stablization Fund. By varying the amount of the deposit (export tax), the government has considerable control over the price and, thus, the level of exports. At the current export deposit rate and the favorable exchange rate (TL 118/US\$), Turkish packers are expected to export about 45,000 tons of figs, fig paste, and waste figs during the 1981/82 marketing year.

<u>Greece</u>. Since the vast majority of the fig trees are scattered throughout olive groves or grape vineyards, their numbers are thought to be declining due to progressive abandonment. However, dried fig production this year is expected to reverse the recent downward trend and rise about 12 percent to 18,500 tons due to no untimely rains. Greek fig production figures include both commercial and so-called discarded figs. These discarded figs make up about one-third of the total and are largely used for alcohol.

As in the case of sultanas and currants, there is a combination of EC and Greek government supports for the 1981 fig crop. The support levels for grade C figs are summarized as follows (drachmas per kilogram):

EC minimum grower price

Additional government income support

GOG "mitigation of additional expenses"

Total grower support

Total grower support

36.57

2.76

1.70

41.03 or 68 U.S. cents

(\$1 equals 60 drachmas)

EC processor subsidy

5.99

In 1980, dried fig exports (including paste) totaled 9,405 tons. The Eastern Bloc took 35 percent of 1980 exports; the United States, 21 percent; and West Germany 18 percent. Export prices in early October were 72 to 76 cents per pound for dried figs and 59 cents per pound for fig paste, c&f. New York. This compares to 1980 prices of 69 to 70 cents per pound for dried figs and 67 cents for fig paste.

With progressive abandonment of fig cultivation, a gradual reduction in production and exports is expected. As evidence of this neglect, 73 percent of the dried figs were classified as grade D (the lowest commercial grade).

Portugal. This season's serious drought reduced both yield and fruit size. Production is estimated at 2,500 tons, 44 percent below the 1980 level. Consequently, prices are up sharply. In October, packers were paying an average of 40 escudos per kilogram (about 62 cents), compared with 28 escudos a year ago.

Combined fig and fig paste exports were 2,035 tons in 1980, down 29 percent from the 1979 level. Over 85 percent of these exports consist of fig paste with the United States being, by far, the principal customer. Combined fig shipments are not expected to exceed 1,250 tons in 1981.

Portugal's fig production potential is projected to continue declining in the foreseeable future as area in the Algrave region gives way to tourist facilities. Maximum production potential is estimated at 7,000 tons in the Algrave region and 750 tons in the northern region of the Tras-os-Montes.

APRICOTS

With the turmoil in Iran and an untimely frost in Turkey, the world supply of dried apricots could be at its lowest level in more than two decades. Exportable supplies will be extremely low and rationed by price.

A heavy spring frost at blooming stage reduced output by 25 percent in Turkey, the principal producing country. Good quality dried apricots in Turkey are difficult to find and exporters were offering average quality fruit at around \$4,000 per ton, f.o.b. (September).

For further information, contact the Foreign Agricultural Service, U.S. Department of Agricultural, Washington, D.C. 20250. Inquiries relative to production and trade estimates may be directed to the Foreign Production Estimates Division (202/382-8891) and to the Horticultural and Tropical Products Division (202/447-3275), respectively.

COMMERCIAL DRIED FRUIT PRODUCTION AND EXPORTS IN SELECTED COUNTRIES, 1977-1979 (Thousand Metric Tons)

Commodity	1977 :	1978 :	PRODUC 1979	: 1980	: 1981 1/	1977 :		PORTS	1980
And : Country :	1977		15/5	• 1700	1901 1/	: 1977 : : :	1978 :	1979 :	1980
country		·		•	•	· · ·	•	•	
APRICOTS, DRIED :						:			
Australia	2.1	2.1	2.4	1.3	1.6	.3	.4	.5	.2
Iran	9.3	5.0	4.0	2/ 3.5	2/ 2.0	8.0	3.6		
South Africa:	1.5	1.1	1.5	1.7	1.9	9	.8	1.2	1.2
Turkey:	10.0	8.0	12.0	8.0	6.0	: 5.8	6.9	6.3	8.3
United States:	4.6	3.3	4.8	3.3	3.3	: 1.7	1.8	1.9	2.4
:						:			
:						:			
Total:	27.5	19.5	24.7	17.8	14.8	: 16.7	13.5	9.9	12.1
•									
CURRANTS									
CURRANTS :	6.1	4.4	6.0	6.4	4.2	2.2	1.8	2.3	2.0
Greece	76.7	67.0	56.0	61.8	61.8	45.4	51.9	51.5	44.2
South Africa	0.8	0.9	0.7	1.0	0.9	: .0	.1	3/	.0
South Allica	0.0	0.,	0.,	1.0	0.7	· .·	• -	21	•0
						:			
Total	83.6	72.3	62.7	69.2	66.9	47.6	53.8	53.8	46.2
:						:			
:						:			
FIGS, DRIED :		10.0	10.0	16.5	10.5	:			
Greece:	20.0	19.0	18.0	16.5	18.5	: 10.8	11.6	8.3	9.4
Portugal	6.0	4.3	5.0	4.5	2.5	: .9	1.8	2.1	1.7
Turkey	42.0	50.0	52.0	55.0	60.0	: 26.9	29.0	32.3	30.7
United States	11.5	8.4	10.6	13.2	10.7	9	1.1	1.8	1.4
;						:			
Total	79.5	81.7	85.6	89.2	91.7	39.5	43.5	44.5	43.2
:									
:						:			
PRUNES :						:			
Argentina:	10.0	9.5	10.0	9.0	7.0	: 9.1	7.5	9.3	8.8
Australia	3.2	2.2	4.6	2.4	2.6	: .7	.1	•2	1.2
Chile:	5.2	5.2	5.4	4.5	5.0	: 3.4	3.7	3.6	2.2
France:	6.1	22.2	24.3	17.8	27.0	: 3.3	2.9	4.3	4.5
South Africa:	1.4	2.1	1.6	1.7	1.3	: .0	.0	0	.0
Yugoslavia:	22.9	14.4	10.8	18.7	20.0	: 13.3	10.2	7.0	17.0
United States (Calif.).:	144.2	119.7	123.4	147.9	140.6	: 51.0	50.1	38.2	46.3
						•			
Total	193.0	175.3	180.1	202.0	203.5	80.8	74.5	62.6	80.0
10041	177.0	1,5.5	100.1	202.0	203.3	:	,,,,,	02.0	00.0
:						:			
RAISINS :						:			
Afghanistan 2/:	40.0	45.0	50.0	75.0	70.0	:			
Argentina:	5.0	4.0	5.5	5.0	6.0	: 2.9	3.0	1.2	1.5
Australia:	56.8	65.0	55.9	91.4	55.7	: 30.3	45.5	39.0	57.2
Chile:	1.4	1.5	2.0	2.0	2.5	: .5	1.0	1.6	1.2
Greece:	61.5	81.0	78.7	68.5	92.0	: 65.9	73.1	58.4	55.9
Iran:	63.0	70.0	60.0	2/ 60.0	2/ 50.0	:			
South Africa:	8.9	12.9	17.5	25.4	23.8	: 2.6	7.6	11.7	16.0
Turkey:	110.0	82.0	83.0	95.0	4/ 105.0	: 89.0	91.3	69.8	73.9
United States:	225.8	90.2	275.0	284.5	226.8	: 35.5	43.9	41.0	63.1
:						:			
Total	572 /	451.6	627.6	706.8	631.8	: : 226.7	265.4	222.7	268.8
Total	572.4	471.0	02/.0	706.8	071.0	. 220./	200.4	222.1	200.0
						•			

⁻⁻⁻Denotes not available, unknown, or not applicable.

SOURCE: Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of U.S. Agricultural Attaches and Foreign Service Officers, results of office research, and related information.

December 1981

Foreign Production Estimates Division, FAS, USDA Horticultural and Tropical Products Division, FAS, USDA

 $[\]frac{1}{2}$ / Preliminary. $\frac{2}{2}$ / Estimate. $\frac{3}{2}$ / Less than 50 tons. $\frac{4}{2}$ / Includes an estimated 10,000 tons of seeded raisins not previously reported.

				(IN METR	IC TONS)					
COUNTRY	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980
ORTH AMERICA										
MEXICO	5,014 1,017	3,982 1,017	5,021 961	4,606 664	4,098 1,477	4,278 675	3,818 830	3,289 978	3,122 743	3,392 1,011
TOTAL	6,031	4,999	5,983	5,270	5,575	4,953	4,647	4,268	3,865	4,40
NTRAL AMERICA BELIZE	16	19	31	7	24	4	34	24	9	
COSTA RICA:	13	3.7	13	30	5	11	36 7	17	23	5
NICARAGUA	41 15	46 14	39 45	28 16	41 21	3 4 2 4	36 35	53 20	35 4	3
OTHER	196 21	72 8	133 32	120 15	167 29	134 29	88 30	170 28	115 23	10
TOTAL	212	187	293	218	288	236	232	313	208	234
ARIBBEAN										
JAMAICA	78 41	71 12	94 23	74 76	117 32	127 11	105 17	94 5	110 0	4
NETHL. ANTILLES: TRIVIDAD TOEAGO:	61 234	41 184	82 140	91 132	95 199	102 109	79 498	61 173	275 184	9 23
OTHER	31	32	23	38	22	39	24	26	15	1
TOTAL	445	340	362	411	465	387	723	358	585	38
OUTH AMERICA BRAZIL	460	60	1,241	201	208	0	126	101	132	3
COLOMBIA	34 59	12 56	22 103	57 85	18 78	65 105	165 140	72 82	265 56	28
SURINAM	12	11	18	12	20	4.5	21	6	8	1
OTHER	1,124	596 n	1+216 13	1+028	805	95 9 6	1+692	1+288	822 15	76 2
TOTAL	1,701	734	2,612	1,386	1,129	1,181	2,153	1,561	1,297	1,22
JROPEAN COMMUNITY BELGIUM LUXEMBOURG:	1,619	1,518	1,983	1,354	1,500	1,620	1,652	1,491	1,496	1,69
OENMARK	2,692	2,274	2,388	2,224	2,578 14,372	2,750 4,576	2,495	2,744	2,454	2,17
GERMANY, FEC. REP.:	1,398	890	5,313	3,208	3,721	3,922	4,282	4,808	3,632	7,62 5,79
IRELANO	257 8,747	5,471	311 8,890	100 4,206	152 9,458	17 5,675	201 7,790	56 8,147	124 6,143	15 9,77
NETHERLANDS	948 4•650	508 2,912	1,420 5,722	1,283 3,206	1,594 3,556	780 2,170	1,038	775 1,847	1,123	98
TOTAL	22,328	17,750	30,770	18,722	36,842	21,510	34,329	21,973	19,859	29,43
HER WESTERN EUROPE										27,43
AUSTRIA	97 1,758	45 1,668	530 2,053	190 2,356	3,998	516 3,018	375 2+362	313 2,364	332 2,7gg	43 2,99
NORWAY	1,751	597	2,192	1,111	1,957	1,672	1,765	2,395	1,542	2,00
SPAIN	393 2,617	439 2,353	745 3,099	646 2,507	1,741	1,004	1,039 2,822	1,268 2,378	1,116	91 2,88
SWITZERLAND	488	535 19	635	532 15	521 18	600	614	639	643	71
TOTAL	7,220	5,750	9,332	7,442	11,408	10;275	9,080	9,450	8,934	10,02
SR AND EAST EUROPE										,
POLANO	0	0	1,377	1,091	516 2,234	1,153	0 241	19 0	0	
OTHER	20	9	0	0	0	0	0	0	ຳ	
TOTAL	20	c	1,377	1,091	2,750	3,000	241	19	0	(
OOLE EAST	122	272	100	9.0	7	222	7	144	7	5.
ISRAEL	192	0	199 4	98 26	39	222	3 6	2	3 17	1
OTHER	8	7	42	24	14	1	9	9	31	7.
TOTAL AR EAST	204	279	245	148	6.0	224	18	155	52	14
HANGAKQYGIMAN;	388	191	335	427	344	348	329	233	293	19
JAPAN	0 965	781	5 721	13 686	6 1,097	10 1,543	61 1,173	3 3,540	3 2,959	5,37
MALAYSIA	158 33	58 5	250 36	153 11	215 14	255 10	314	250	333 0	27
SINGAPORE	162 24	78 29	267	343 44	382	407	601	677	780	72
OTHER	44	7	54 53	18	75 25	73 11	43 14	7	3	6
TOTAL	1,765	1+170	2,131	1,915	2,674	3,101	3,082	5 • 2 9 5	4,654	7,08
RICA CAMEROON	0	G	e	0	0	0	122	0	0	
CANARY ISLANOS: EGYPT:	55 0	9	151 g	6	29 30	31 13	41 0	51 17	28 0	4
MOROCCO	122 79	6 0 75	62 197	2 370	0	638	55 1	0	-0 352	
SPANISH AFRICA:	1	0	0	n	0	0	35	0	0	1,23
OTHER	36	3	42	4	32	24	10	8	18	1 21
TOTAL	293	147	453	382	91	706	264	76	399	1,31
AUSTRALIA:	4	0	2	525	320	135	118	130	136	12
FR PACIFIC ISLANOS: NEW ZEALAND	15 4 7 5	14 130	25 55 7	21 557	35 7 7 9	22 349	26 506	26 58 7	21 511	3 37
OTHER	0	0	1	6	5	6	1	3	0	
	493	194	586	1,110	1,140	511	651	746	668	53.

WORLD TOTAL.....: 40,712 31,550 54,145 38,094 62,421 46,085 55,421 44,214 40,490 54,780
NOTE: TOTALS MAY NOT A00 DUE TO ROUNDING.

COUNTRY	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980
ORTH AMERICA CANADA	5,987 2,679 3	4,397 415 0	5,316 273 0	7,295 166 0	8,606 381 0	6•037 67 0	6•792 132 0	4 • 5 7 0 3 4 3 0	8,087 104 0	8,879 17 0
TOTAL	8,670	4,812	5,589	7,461	8,987	6,104	6,924	4,913	8,191	8,896
ENTRAL AMERICA COSTA RICA	54	25	26	15	20	14	26	12	37	7
GUATEMALA	50 136	29 66	54 121	25 90	50 175	43 91	59 167	94 73	51 211	47 147
OTHER	70	38	102	48	86	44	110	59	48	56
TOTAL	310	159	303	178	331	192	362	237	356	257
RIBBEAN										62
BAHAMAS	41 59	38 40	51 54	51 50	63 61	52 113	62 40	31 60	5 4 6 2	60
DOMINICAN REPUBLIC: FRENCH WEST INDIES:	98 7	70	88	120	121	83 1	104 17	39 15	189 61	119 2
JAMAICA	12 57	9 36	27 49	88 57	52 58	9 67	3 80	138	75 69	103 81
TRINIDAD TOBAGO:	23 13	7	11	123 15	46	25 12	38 23	17 15	56 17	132 25
TOTAL	310	218	289	507	410	363	366	318	584	584
UTH AMERICA	***					000	000	• • • • • • • • • • • • • • • • • • • •	50,	
ARGENTINA	0 389	0 426	3 792	0 717	0 273	0	22 221	20 59	373 122	52 149
COLOMBIA	9	2	55	47	8	117	187	148	801	362 156
PERU	152	53	119 500	87 0	100	81	151	79	143	53 1,237
VENEZUELA	1,015 38	403 15	874 52	505 19	973 20	711 23	1,400	615 8	1,168 89	1,23/
TOTAL	1,603	899	2,395	1,376	1,375	933	2,014	930	2,709	2,079
ROPEAN COMMUNITY										1 100
BELGIUM LUXEMBOURG: DENMARK	976 3,574	744 1,483	1,042	707 1,844	1,042	784 2,016	1,277	607 1,347	1,221	1,122 2,413
FRANCE	498	200	639 2,893	465	4 0 2	157	708 3,161	116	2,635	1,296
IRELAND	949	157	181	471	106	57	51	17 153	525 559	17 18
NETHERLANDS	1,396 10,410	543 1•771	1,015 5,990	1,376 6,038	2,101 7,082	1,245	2,012 2,786	716 692	2,604 7,695	1,625 4,318
TOTAL	22,264	6,793	14,081	13,864	15,634	3,743 9,612	12,231	5,381	23,899	
HER WESTERN EUROPE	229204	69173	14,001	13,004	15,654	79012	12,231	34301	239677	17,230
AUSTRIA	36	8	89	39	39	20	92	13	192	47 2,209
FINLAND	3 • 1 82 2 4 2	1,270 68	2,420 195	1,973 98	2,857 156	2,956 74	2,022	1,390 72	2,411	1,921
NORHAY	1,668 8	611	1,640 7	1,314	1,799	1,153 6	1,560 0	1,007	2,058 93	C
SPAIN	3,889	1,685	15 3,353	46 2,861	3 • 4 5 2	28 3,116	26 3,135	2,095	114 3,419	77 3,407
SWITZERLAND	836	529 1	1,054	631 1	787 2	679 8	797	472 0	629 1	ხ20 3
TOTAL	9,864	4,180	8,772	6,983	9,137	8,039	7,765	5,048	9,059	8,573
SR AND EAST EUROPE USSR	0	0	1	0	0	c	1 • 4 8 6	0	539	C
TOTAL		0	0	0			1,486	_U	539	
DDLE EAST										·
ISRAEL	9	3 28	6 13	1 5	1	0	30	0 2	124 293	202 394
SAUDI ARABIA: UNITED ARAB EMIRAT:	1 0	7	17	7 3	17	64	64	24	84	466
OTHER	4	ő	3	7	ź	9	5	ž	6	29
TOTAL	19	37	39	23	27	75	105	29	5 u 9	1,473
R EAST	1.154	115	280	644	1.186	487	1,213	389	1.910	1 071
CHINA (TAIW (N): HONG KONG	808	148	486	424	511	165	396	155	1,939 757	1,873
INDONESIA	9	0 1	22	0 4	0 49	40	143	87 34	37 75	142
JAPAN	20,374	4,510	200	14,427 55 0	20,945	15,458	16,243 279 0	120	551	19,535 702
LAOS	172	0 53	0		0 278	0 24 7	0 347	226	0 411	609
NANSEI ISLANDS: PHILIPPINES	118 780	0 274	0 126	0 176	0 171 857	0 71	0 95	0 95	0 23	168
SINGAPORE	352 1	102	126 248 13	512	857 91	304 149	450 144	298	868	646
VIETNAM	301	111	34	0	0 5	0 7	0 347 0 95 450 144 0	0	0	144
TOTAL			11,012							
RICA	L-1,-1-J	3,723	114015	10,010	2.,570	107061	17,070	0,001	174303	24,630
GYPT	0 42	0		0 22	58 31	1 33		0 11	0	100
OTHER										
	42	2	25	22	89	33	85	11	4 /	127
STRALIA AND PACIFIC AUSTRALIA	0 13	18	0 14	51	21 16	1	0	1	0	2
FR PACIFIC ISLANDS: NEW ZEALAND	13	9 509	0 14 1,151 3	109 904	1,540	1 12 678 1	24 759	1 15 395 1	12 630	760
OTHER										
TOTAL	1,477	536	1,168	1,067	1,576	692	786	412	647	786
WORLD TOTAL	49.003	23.059	43-673	47.999	61-936	41.064	51.517	23 - 635	66.042	64 621

 $[\]underline{1}/$ INCLUDES 102 METRIC TONS FROM SYRIA.



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